

Succession Planning: Key Position Criteria Checklist

Following is a list of questions that may help the organization to identify key positions for succession planning. Use it to complete the “Reason this is key/critical position” section of the [“Succession Planning Template”](#):

- ☐ **Mission:** Is the position a key contributor to the organizational mission?
- ☐ **Leadership:** Is this a leadership position (exempt status, manages a division, department or agency, etc.)?
- ☐ **Critical Function:**
 - Does the position perform tasks **critical to vital functions** such that leaving it vacant would hinder or prevent success of the mission?
 - Does this position solely **hold important information** (that should continue to be held by only one person)?
 - Does this position serve as a **“hub”** where one or more other essential functions or processes come together?
- ☐ **Specialization:** Does the position provide specialized leadership or skills that are difficult to replace (technical, content-specific)?
- ☐ **Location:** Does the position fill a unique and important capacity at a particular location that would be difficult for another position, or the same position in another location, to take over?
- ☐ **High Turnover:** Is the position in a class or occupational group that is vulnerable to high turnover?
- ☐ **Essential in Nature:** Would the sudden absence of a person in this position create a rapid breakdown in operations?

You may also wish to respond to these questions:

1. Why is this position key or critical?
2. What are the external and internal factors affecting this position?
3. How will the position be used in the future?